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EBOOK

The evolving CSO: 9 trends shaping the future of sales leadership

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Introduction

The role of the Chief Sales Officer (CSO) is undergoing a radical transformation. As businesses face an onslaught of technological advancements, shifting market dynamics, unpredictable supply chains, and increasingly complex buyer behavior, CSOs find themselves under immense pressure to do more than just managing sales funnels and quotas. Instead, they're being asked to drive growth, adapt quickly, and harness new tools to stay competitive.

Gone are the days when a CSO could succeed by relying on traditional sales tactics. The modern CSO must be both a strategist and a change agent, leading their teams through constant disruption while capitalizing on emerging opportunities.

Technology is one of the primary forces driving this change. As automation, data analytics, and artificial intelligence revolutionize every facet of business operations, CSOs are tasked with leveraging these tools to enhance sales performance. At the same time, external factors like market volatility, economic downturns, and geopolitical shifts make profitability unpredictable—requiring CSOs to remain agile and responsive.

In addition, buyers have become more informed—and selective. Traditional one-size-fits-all sales models no longer resonate with today's sophisticated buyers. Successful CSOs must lead the charge in developing new sales strategies that can engage and convert these increasingly discerning customers.

In this eBook, we will explore nine major trends that are reshaping the CSO's role. These trends can be divided into three clear categories:

- 1. Integration and consolidation**
- 2. Managing new sales models**
- 3. AI in the deal cycle**

By understanding these trends, CSOs can effectively navigate disruption, drive innovation, and deliver results in an increasingly complex business environment.

Part I:

Integration and consolidation

Integration and consolidation

In a world where businesses are inundated with data and tools, the ability to consolidate resources, unify systems, and enhance collaboration has become critical. Today's CSOs face a growing need to streamline and align various sales functions, in order to drive greater efficiency and performance.

The challenge for CSOs lies in not only managing disparate sales processes, but also integrating them seamlessly to create a more cohesive and agile approach. By optimizing the integration of data, systems, and processes, CSOs can reduce inefficiency and ensure that sales efforts are aligned with broader business objectives.

Let's take a look at the trends related to integration and consolidation—and how they can empower CSOs to optimize sales operations.

Trend 1: Tying the data together

Data-driven selling wins. With the right data, sellers gain a complete understanding of the buyer and real, actionable insights into their needs—so they can build offers that resonate and close deals more effectively. In addition to creating a competitive advantage, a high level of customer insight also allows sellers to work more autonomously, freeing up the CSO to focus on the highest value opportunities.

Unfortunately, the data required to deliver these insights is often buried in multiple systems—and, as a result, sellers spend too much time hunting for information.

Tying that critical data together results in more personalized offers, faster deal cycles, and higher win rates. But the only way to do this effectively is by consolidating data on a single, accessible platform that serves as a single source of truth for sellers.

CSOs must champion the creation of centralized data platforms—but they aren't alone in this effort. CEOs also recognize the need for data consolidation. According to [research from IDC](#), **84% of CEOs see a need for better integration** across CRMs, ERPs, product catalogs, and quoting tools.

Trend 2: Simplifying the tech stack

For CSOs, a streamlined tech stack is crucial to improving both sales efficiency and overall performance. Increasing the number of tools available to sales teams can lead to inefficiency, as sellers spend too much time navigating complex systems instead of engaging with buyers. In fact, [research from Gartner](#) found that when sellers are overwhelmed by complex technology requirements, they are **45% less likely to achieve their quota**.

When tools are disconnected and data is siloed, sales teams can't meet buyer expectations for quick, seamless interactions across channels. Instead, sellers waste valuable time piecing together pricing, quotes, customer data, and other information—ultimately slowing down the sales cycle.

This inefficiency also impacts sales leaders, who must pull data manually from multiple tools to generate a complete view of sales performance and revenue generation.

By simplifying the tech stack and ensuring better data integration, CSOs can empower their teams with more accurate insights and faster response times. A streamlined, cohesive toolset enables sellers to focus on what they do best—closing deals—while providing leadership with the clarity they need to drive strategy.



Trend 3: Faster internal processes to win more deals

For CSOs, improving operational efficiency is essential to winning more deals. In today's competitive environment, buyers expect quick responses and seamless interactions. If sellers are bogged down by slow internal processes, it becomes difficult to meet these expectations. Inefficient workflows lead directly to missed opportunities and lost revenue.

Automating processes not only improves clarity and speed but also eliminates the errors that can erode buyer trust. By streamlining and automating tasks like data entry, quote generation, and contract management, sales teams can operate more efficiently and react more quickly to both customer demands and market shifts.

Recent [research from Conga](#), in partnership with Ascend2, found that time-consuming manual tasks are the biggest barrier to capturing revenue. Additionally, **79% of executives say they spend six or more hours each week** on manual, revenue-related tasks—time that could be better spent engaging with customers and closing high-value deals.

Today's buyers have little tolerance for delays, so CSOs must enable their teams to move quickly, close deals faster, and meet the demands of an increasingly impatient market. Automation is more than just a tool—it's a competitive advantage.

Part II:

Managing new sales models

Managing new sales models

Modern CSOs must adapt to a rapidly changing sales landscape where traditional selling models are no longer sufficient. With an increasing number of revenue channels and more sophisticated buyers, CSOs are re-evaluating their approach to both sales strategies and revenue structures.

The rise of new selling models—coupled with the complexity of managing multiple touchpoints—requires a fresh approach to coordination and execution. At the same time, clarity and consistency across channels are critical for delivering a unified view of revenue generation to the C-suite.

This section explores the trends CSOs must understand in order to manage evolving sales models, navigate shifting market dynamics, and drive sustainable growth.

Trend 4: Empowering the multi-channel seller

According to a [2024 McKinsey study](#), B2B buyers now use an average of **10 channels throughout their purchasing journey**—up from five in 2016. These buyers expect seamless interactions across these channels, and they won't be satisfied with a less-than-consistent experience. In today's customer-centric sales environment, empowering the multi-channel seller is crucial.

Modern sellers must be equipped to engage with customers wherever they choose to interact—whether that's via email, phone, social media, or in person—using a consistent sales approach across every touchpoint. Sellers should be empowered to leverage a range of tools and platforms, including partnerships, to meet the evolving needs of the customer. Following a clear, unified strategy allows sellers to move seamlessly between channels as the buying journey progresses.

Realizing this vision requires a single, connected view of the customer—and the sales process. CSOs must ensure that all sales activities, regardless of platform, are integrated into a single, cohesive system. This connected approach allows sellers to access consistent customer data and insights, enabling them to deliver a more personalized experience, increase engagement, and ultimately drive higher conversions.

Trend 5: Managing expanding revenue models

Today's buyers are moving beyond traditional buy-to-own transactions. Instead, they are seeking alternative purchase methods like subscriptions, consumption models, usage models, and even outcome-based models. These complex revenue channels introduce new challenges for sales teams, as they require more flexible and nuanced approaches to deal management.

According to a 2024 Accenture study, **88% of CEOs expect the rate of complex change to continue rising**, putting more pressure on sales leaders to manage these increasingly intricate sales channels and activities. As new buying models make revenue predictions more difficult, sales leaders must rely on advanced analytics and AI to navigate the complexities of forecasting and sales optimization.

To succeed, CSOs must invest in tools and technologies that can handle diverse revenue streams, ensuring a unified approach to managing these channels. This may include leveraging AI-driven insights to predict customer needs and using analytics to track performance across different models. By embracing these tools and strategies, CSOs can streamline the management of expanding revenue channels and maximize their revenue potential.



Trend 6: Maintaining clarity and consistency

Increasingly complex sales processes and the need for faster decision-making are driving sales leaders to adopt new revenue lifecycle management solutions. These tools require careful consideration to ensure that new technology integrates seamlessly with existing systems. It's also critical to evaluate the software's reporting and analytics functionality, and its ability to provide accurate, data-powered insights.

The C-suite demands fast, accurate revenue projections, as well as a deep understanding of the organization's most profitable products and services. To meet these expectations, CSOs must be confident that their reporting framework provides consistent, reliable insights into sales performance. Every executive—from the CEO to the CFO—needs a unified view of revenue to make informed decisions about resource allocation and growth strategies.

Sophisticated technology is the key to unifying data from various channels and touchpoints—and delivering actionable insights in real time. By leveraging integrated tools and analytics, CSOs can provide leadership with a clear, consistent picture of sales performance.

Part III: **AI in the deal cycle**

AI in the deal cycle

Artificial intelligence (AI) is transforming the way CSOs approach the sales process. As AI technologies continue to evolve, they offer powerful tools to enhance decision-making, streamline operations, and improve customer engagement throughout the deal cycle.

From identifying the most promising opportunities to optimizing pricing strategies, AI is becoming integral to every stage in the sales cycle. By leveraging AI, CSOs can not only enhance selling effectiveness but also improve processes outside the sales team that impact sellers' ability to close deals.

The following trends demonstrate how AI is reshaping modern sales strategy. In an increasingly competitive market, mastering these trends is essential for any CSO looking to stay ahead of the curve.

Trend 7: Delivering the perfect product mix

Leveraging AI empowers CSOs to improve their sales strategy and deliver a more personalized, consultative approach to selling. As buyers explore multiple options to meet their needs, sellers must go beyond simple transactions and offer expert advice to help their customers solve specific business challenges.

AI plays a pivotal role in this evolution by helping sales teams identify optimal product configurations and services for complex buying needs. With AI, sellers can deliver real-time, data-driven recommendations and tailored solutions that set them apart from the competition. This consultative approach not only helps close deals but also builds long-term trust with buyers, reducing perceived risk and strengthening relationships.

AI can also assist in making recommendations based on a buyer's history, preferences, and behavior—ensuring the mix of products and services is always aligned with customer needs.

As buyers move between different channels, AI-powered chatbots and self-service tools provide real-time guidance on purchasing decisions. This rapid response improves the overall buyer experience, accelerates the deal cycle, and enhances customer satisfaction.

Trend 8: Augmented configuration and pricing

For products with complex configurations or extensive options, CSOs can leverage AI to significantly accelerate the process of generating a proposal that's tailored to the customer's needs. AI-powered tools can quickly analyze customer requirements and recommend the best configurations, reducing manual effort and ensuring that no detail is overlooked. This is particularly valuable for products that have layered dependencies or bundling constraints, as AI can offer real-time guidance to ensure the seller isn't presenting an invalid product configuration to the buyer.

AI also plays a critical role in pricing strategies. Until now, understanding the optimal price to win a deal has been more art than science. But with AI, sales leaders can analyze historical data including winning deals, customer profiles, and buying patterns to gain clear insights on the best pricing for each deal. This data-driven approach enables sales teams to maximize wallet share while maintaining profitability.

By incorporating AI into both configuration and pricing, CSOs can increase sales efficiency while also providing a more personalized experience for customers—leading to faster deal closures and higher win rates.



Trend 9: AI beyond sales

The CSO is central to revenue generation for any business, but they must often rely on the responsiveness of other teams to maintain sales momentum. Slow processes anywhere in the revenue lifecycle will directly impact sellers' ability to serve their customers. This is especially true in contract management, where delays in legal review can jeopardize the ability to close deals.

AI can be a game changer in addressing this challenge, by streamlining and accelerating processes that impact sellers' ability to move deals forward. For example, AI technologies like contract lifecycle management (CLM) tools are increasingly common for automating contract processes. In fact, Gartner reports that 50% of B2B buyers are now using AI tools like CLM for contract review.

AI-powered contract analysis reduces the workload for the legal team, but its true value lies in the ability to improve seller response times and minimize the risk of losing business to more nimble competitors. Additionally, using AI to analyze existing contracts can uncover insights to help cross-sell new products, upsell additional licenses, or simply retain current customers—maximizing all possible revenue opportunities.

Bonus trend: the rise and fall (and rebirth) of CRMs

Customer relationship management (CRM) software plays a critical role in managing customer data. But these tools were never meant to serve as the central hub for revenue management. As a result, they are insufficient for delivering the insights CSOs need to fully understand sales performance and revenue opportunities.

Instead, CSOs need a dedicated revenue lifecycle management platform—like [Conga's Advantage Platform](#)—that provides centralized process management and automation, plus a single

source of truth for revenue data. These platforms accelerate response to customer needs, improve quote accuracy, and streamline quote-to-cash with automated workflows that span every phase of the revenue process.

CSOs who embrace revenue lifecycle platforms are:

- More informed on revenue opportunities and revenue capture
- Better equipped to deliver accurate revenue forecasts
- Focused on high-value areas where the most revenue is being captured
- More responsive to market and buyer opportunities
- Successful at winning more deals at a lower overall cost

CRMs remain an important part of any company's tech stack, but they are specialized tools and should be used as such. Moving forward, CRMs will increasingly become just one part of a larger revenue infrastructure that wins deals and grows the top line.

Navigate a complex future with confidence

Today's sales leaders face increasing pressure to deliver consistent revenue growth—so optimizing the entire revenue lifecycle is more critical than ever. From the initial quote through contract renewal, every step in the process presents an opportunity to streamline operations, enhance efficiency, improve customer relationships, and transform revenue outcomes.

Revenue lifecycle management is the thread that ties siloed business processes together—including sales, finance, IT, and more—to optimize revenue at every stage of the customer journey. The right revenue lifecycle management technology equips CSOs with the tools they need to reduce bottlenecks, improve forecasting accuracy, and deliver seamless customer experiences that fuel sustainable growth.

The [Conga Advantage Platform](#) is the leading revenue lifecycle management solution on the market today. This all-in-one revenue intelligence platform is designed to support the end-to-end revenue lifecycle and connect every step of the sales journey, with a fully integrated suite of tools to manage:

- Quoting and pricing
- Contracting processes
- Document generation
- Billing and invoicing
- Electronic signatures
- Digital commerce
- And much more

With Conga, companies can simplify complex revenue processes, improve cross-functional efficiency, enhance customer satisfaction, and gain a true Revenue Advantage.

Start unlocking your revenue potential today! Book a demo to learn how the Conga Advantage Platform can transform your sales process and optimize the entire revenue lifecycle.

[Book demo](#)

About Conga

Conga is the pioneer and market leader in Revenue Lifecycle Management. Its platform is chosen by the world's growth champions to accelerate the end-to-end revenue lifecycle and achieve a Revenue Advantage. Conga brings Configure, Price, Quote, Contract Lifecycle Management, and Document Automation capabilities together on a single open platform that works with any ERP, any CRM, and any Cloud. Conga is born for the top line—powered by a unified revenue data model, complete revenue intelligence, and purpose-built AI—to help companies grow, protect, and expand their revenue.

Conga delivers a Revenue Advantage to over 10,000 customers and 6.4 million users around the world. More than 7 million contracts and 46 million quotes are generated annually with Conga. Founded in 2006, the company is headquartered in Broomfield, CO and has offices across the United States, India, and Ireland. Visit conga.com for more information.



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